



Infor LN User Guide for Rental Equipment as a Service

Release 2022.x

Important Notices

The material contained in this publication (including any supplementary information) constitutes and contains confidential and proprietary information of Infor.

By gaining access to the attached, you acknowledge and agree that the material (including any modification, translation or adaptation of the material) and all copyright, trade secrets and all other right, title and interest therein, are the sole property of Infor and that you shall not gain right, title or interest in the material (including any modification, translation or adaptation of the material) by virtue of your review thereof other than the non-exclusive right to use the material solely in connection with and the furtherance of your license and use of software made available to your company from Infor pursuant to a separate agreement, the terms of which separate agreement shall govern your use of this material and all supplemental related materials ("Purpose").

In addition, by accessing the enclosed material, you acknowledge and agree that you are required to maintain such material in strict confidence and that your use of such material is limited to the Purpose described above. Although Infor has taken due care to ensure that the material included in this publication is accurate and complete, Infor cannot warrant that the information contained in this publication is complete, does not contain typographical or other errors, or will meet your specific requirements. As such, Infor does not assume and hereby disclaims all liability, consequential or otherwise, for any loss or damage to any person or entity which is caused by or relates to errors or omissions in this publication (including any supplementary information), whether such errors or omissions result from negligence, accident or any other cause.

Without limitation, U.S. export control laws and other applicable export and import laws govern your use of this material and you will neither export or re-export, directly or indirectly, this material nor any related materials or supplemental information in violation of such laws, or use such materials for any purpose prohibited by such laws.

Trademark Acknowledgements

The word and design marks set forth herein are trademarks and/or registered trademarks of Infor and/or related affiliates and subsidiaries. All rights reserved. All other company, product, trade or service names referenced may be registered trademarks or trademarks of their respective owners.

Publication Information

Release: Infor LN 2022.x

Publication Date: December 5, 2022

Document code: ln_2022.x_tsequipmentug__en-us

Contents

About this guide.....	5
Contacting Infor.....	5
Chapter 1: Introduction to Rental Equipment.....	7
Chapter 2: Rental equipment data setup.....	8
Rentable equipment.....	8
Rental agreement template.....	9
Chapter 3: Rental agreements.....	11
Rentable service order activities.....	11
Other cost lines with cost type Rental.....	12
Material cost lines for sub-equipment.....	12
Chapter 4: Impact of rental equipment.....	14
Service order activity/cost lines restricted.....	14
Assignments for rentable activities.....	15
Actual location address for rental equipment.....	15
Actual location address for material cost lines.....	16
Ship to address.....	16
GPS Data for the serialized item.....	16
Transferring call to Rental Agreement.....	16
Chapter 5: Planning and reservation for equipment.....	17
Creating rental equipment calendar.....	17
Updating rental equipment calendar.....	17
Deleting rental equipment calendar.....	17
Reservation for rental agreement.....	18
Manual reservation.....	18
Loan equipment to Internal Employee.....	19

Chapter 6: Rental Equipment Request.....	20
Rental equipment request from Project.....	20
Processing a Planned Equipment Request.....	21
Rental equipment request from Call.....	22
Processing rental equipment requests.....	22
Deleting a rental equipment request.....	23
Cancelling a rental equipment request.....	23
Chapter 7: Equipment Management Workbench.....	24
Equipment Management Workbench toolbar.....	24
Equipment Management Workbench Resources Gantt.....	25
Equipment Management Workbench Location map.....	27
Equipment Management Workbench Activities and Material grid.....	27
Equipment Management Workbench user settings.....	28

About this guide

This document describes the processes related to the rental equipment as a service functionality in Infor LN.

Intended audience

This document is intended for persons responsible for the implementation and activation of the Rental Equipment functionality. Consequently, the intended audience can include key users, implementation consultants, product architects, and support specialists.

Assumed knowledge

Although you need no detailed knowledge of the LN software to read this guide, general knowledge of the LN functionality will help you understand this guide.

Document summary

This table shows the chapters of this guide:

Chapter	Content
Introduction	Provides an overview of the Rental Equipment functionality in Infor LN
Rental equipment data setup	Provides information on the initial data setup and activation of the Rental Equipment functionality
Rental agreements	Provides information on the Rental agreements
Impact of rental equipment	Provides information on the impact of Rental Equipment
Planning and reservation for equipment	Provides information on the Plainning and reservation for equipment.

Contacting Infor

If you have questions about Infor products, go to Infor Concierge at <https://concierge.infor.com/> and create a support incident.

The latest documentation is available from docs.infor.com or from the Infor Support Portal. To access documentation on the Infor Support Portal, select **Search > Browse Documentation**. We recommend that you check this portal periodically for updated documentation.

If you have comments about Infor documentation, contact documentation@infor.com.

Chapter 1: Introduction to Rental Equipment

The migration to a service-based economy has led to a fundamental shift in manufacturing industries towards a business model in which the service component of products, based on the value provided to customers, is becoming dominant.

Corresponding to shifting requirements at the manufacturer's side, it can be observed that customers are becoming less interested in buying products. In fact, they expect comprehensive solutions for their problems and more infrequently draw a distinction between product and service elements.

Following this shift towards an extensive service orientation, manufacturers need to up the ante by offering their customers more sophisticated solutions that will support customers' operations and profitability. The concept of performance-based contracts strictly refers to this point. This approach means that products are no longer sold to the customer but instead the supplier provides and operates the product whereas the customer only has to pay for performance. Within performance contracting the customer does no longer buy products and several services separately, for example, the maintenance or repair services, instead he acquires a comprehensive service bundle. The supplier does not sell the product and instead provides the usage for a fee.

Chapter 2: Rental equipment data setup

You can rent out a serialized item as an equipment to the external customers or the internal employees. To rent an equipment, you can create a quote (using service orders), check the availability, plan and reserve the equipment. You can also send an invoice for the actual usage. For long term rental, invoicing by installment is also supported. After the equipment is rented out, the actual location of the equipment can be tracked based on the GPS data.

To use a serialized item as a rental equipment, you must:

- Select the **Equipment as a Service** check box in the **Implemented Software Components (tccom0100s000)** session.
- Define an item with the **Item Type** field set to **Equipment Items (tcibd0501m000)** session.
- Define the item with the **Rentable** check box selected in the **Serialized Items (tscfg2100m000)** session. You must select the item for which the **Item Type** field is set to **Equipment** in the **Items (tcibd0501m000)** session.
- Specify the **Rental** units in the **General Service Parameters (tsmdm0100m000)** session.
- Define a service type with the **Order Procedure** field set to **Rental** in the **Service Types (tsmdm0130m000)** session.
- Specify this information in the **Service Order Parameters (tssoc0100m000)** session:
 - The **Service Type** for **Rental**. The service type is used for the service order header, service order activity, reference activity and serialized item.
 - The **Number Group** for Rental Equipment Service Orders.
 - Select the **Use Installments for Rental** check box to enable invoicing by installment for the equipment.
- Specify the **Number Group** and **Series** for Rental Equipment Service Orders in the **Service Offices (tsmdm1100m000)** session and the **Service User Profiles (tsmdm1150m000)** session.
- Define the rental terms for the serialized item group in the **Rental Equipment Terms Template (tscfg0111m000)** session.

Rentable equipment

To use a serialized item as a rentable equipment, in the **Serialized Items (tscfg2100m000)** session, you must:

- Select the **Rentable** check box.
- Specify the details on the **Rented** tab.
Note: You must select the item from the **Items (tcibd0501m000)** session, for which the **Item Type** field is set to **Equipment**.

A rentable serialized item can be used as the main rentable equipment for which the rental agreement (service order activity) is created, or as a sub-equipment linked to the related material lines.

You can link a rentable serialized item to service objects such as a reference activity or a service order activity.

You can use the **Rental Equipment Calendar Manual Reservations (tscfg2163m000)** session to change the **In Use by Employee** data manually if the item is not linked to an active manual reservation. Because the rental calendar is based on the serialized item calendar and availability type, you must run the **Update Rental Equipment Calendar (tscfg2262m100)** after the **In Use by Employee** data is modified.

Infor LN displays a message to confirm if the equipment calendar must be created when:

- You select the **Rentable** check box for the item. OR,
- You modify the **Calendar** or the **Availability Type**.

If you select **Yes**, Infor LN displays the **Create Rental Equipment Calendar (tscfg2262m000)** session to review the data that is defaulted from the **Serialized Items (tscfg2100m000)** session. If required, you can modify the **Calendar Start Date**.

Note: The message is displayed only if an equipment calendar does not exist for the combination of the **Serialized Item**, **Calendar** and **Availability Type**, in the **Rental Equipment Calendar (tscfg2562m000)** session.

If the equipment is rented out, you cannot supersede this equipment.

You can link skills to a serialized item even if the **Equipment as a Service** check box is cleared in the **Implemented Software Components (tccom0100s000)** session. You can link the required skills for a serialized item using the **Skill Requirements by Serialized Item (tscfg2105m000)** session, if the **Skills** check box is selected in the **General Service Parameters (tsmdm0100m000)** session.

You can create a customer and supplier claim for a rental agreement. The claim can be generated or created manually.

Rental agreement template

To use a reference activity as a template for a rental agreement, you must define a reference activity with this data in the **Reference Activity** session:

- Set the **Activity Use** field to **Rental**.
- Link a **Service Type** for which the **Order Procedure** field is set to **Rental** in the **Service Types (tsmdm0130m000)** session.
- Specify the **Item** in the **Specific For** groupbox for which:
 - The **Item Type** field is set to **Equipment** in the **Items (tcibd0501m000)** session.
 - The **Rentable** check box is selected in the **Serialized Items (tscfg2100m000)** session.

For a reference activity with the **Activity Use** field is set to **Rental**, you can create related resource requirement lines with the **Resource Type** field set to **Rental**, in the **Resource Requirements (tsacm2120m000)** session. These resource lines hold the cost or service items (mandatory) and are copied to the service order activities other cost lines with **Cost Type, Rental**.

In the **Resource Requirements (tsacm2120m000)** session, when the **Cost Specification Type** field is set to **Rental Period Costs**:

- Infor LN defaults the **Unit** for the **Free Rental Quantity** field from the **General Service Parameters (tsmdm0100m000)** session.
- Infor LN considers the price specified for the resource line as the base price per rental unit (for example, the price per day)

Note: At least one resource line must exist for the reference activity with the **Cost Specification Type** field set to **Rental Period Costs**, when the **Activity Use** field is set to **Rental** for a reference activity.

Chapter 3: Rental agreements

Service orders can be used as rental agreements to rent out an equipment. To use a service order as a rental agreement, in the **Service Order** session, this data must be set:

- Specify the **Service Type** for which the **Order Procedure** field set to **Rental** in the **Service Types (tsmdm0130m000)** session.
- Set the **Order Procedure** field of the service order to **Rental**.

The service order is created based on the **Rental Number Group** specified in the **Service Order Parameters (tssoc0100m000)** session.

Note: For a service order with the **Order Procedure** field set to **Rental**:

- You can create activities that are not related to rental.
- You can link a non-rental equipment item or installation to the service order. However, the contract coverage or warranty applicable to the item or installation are not applicable to the rental agreement activity lines.

Rentable service order activities

To create a rentable service order activity, you must set this data in the **Service Order Activity (tssoc2110m100)** session:

- The **Rental** check box must be selected.
- A serialized item must be linked for which:
 - The **Item Type** field is set to **Equipment** in the **Items (tcibd0501m000)** session.
 - The **Rentable** check box is selected in the **Serialized Items (tscfg2100m000)** session.

For a rentable service order activity, Infor LN defaults the **Rental Service Type** from the **Service Order Parameters (tssoc0100m000)** session.

Infor LN copies the reference activity and the linked resource lines to a service order activity if:

- The **Rental** check box is selected for the service order activity line.
- The same rentable serialized item is linked to the service order activity and the reference activity, for which the **Activity Use** field is set to **Rental**.

Note:

- For an external service order, if the **Rental** check box is cleared but a rental equipment is linked to the service order activity line, Infor LN selects the **Rental** check box.
- For an internal service order that is used for maintenance or repair, you can create a service order activity line to which a rental equipment is linked, but the **Rental** check box is cleared.

- If the rentable service order activity status is set to **Free**, you can print an acknowledgement even if a serialized item is not linked. However, a serialized item must be linked to update the activity status to **Planned**.

You can link Cost or Service items to the **Rental** cost/resource type line. Prices and discounts data retrieval is similar to that of cost specification type **Other**.

Other cost lines with cost type Rental

When the **Rentable** check box is selected for a service order activity in the **Service Order Activity** session, you can create the related other cost lines in the **Service Order Other Costs (tssoc2142m000)** session with the **Cost Type** field set to **Rental**.

Note: You cannot clear the **Rentable** check box of the activity if other cost lines with the **Cost Specification Type** field set to **Rental** exist.

For the rental other cost line, you must specify:

- An item of the type, **Cost** or **Service**.
- The **Free Rental Quantity** and **Unit**. The free rental quantity is subtracted from the estimated/actual quantity before the (invoicing) amounts are calculated.
Note: The total quantity must be more than zero.

The Unit Cost of the **Rental Period Costs** cost line is the unit cost of the rental equipment item of the related rental agreement. This unit cost is retrieved from Project Equipment.

The unit cost of the cost or service item is not considered. However, the item is used to determine the sales price and/or discounts in pricing.

Material cost lines for sub-equipment

To link the sub-equipment to the service order rental agreement activity, you can specify items of type equipment on the material cost lines. Items can be serialized or anonymous. If serialized, the **Rental** check box must be selected.

Equipment items can be linked to material lines only when the **Rentable** check box is selected for the related service order activity.

Note: You cannot clear the **Rentable** check box of the activity if material lines with equipment exist.

Because these items are not shipped by Warehousing, the **Delivery Type** of the items must be **From Rental Fleet**. The item location is the same as the actual location address of the rental equipment linked to the service order activity.

For the equipment items used on material lines, Planned Equipment Transactions (PET) must be maintained. For planning, it is mandatory that these items have the same **Minimal Rental Period** defined for the main equipment linked to the service activity **Rental Agreement**.

The Unit Costs for the equipment used on material lines is retrieved from Project Equipment.

Note: For the rentable equipment item linked to the material line, the serial number must exist. You cannot generate a serial when linking the item.

Chapter 4: Impact of rental equipment

This chapter describes the impact of Rental Equipment on service objects.

Service order activity/cost lines restricted

The functionality of a rentable service order activity and related cost lines is restricted because a rental equipment linked to a rental agreement is:

- Not to be repaired
- Company owned
- Not sold
- Not shipped or received by Warehousing

Activity restrictions

- The **Installation Group** linked to the service order activity must be **Company Owned**.
- For the rentable equipment item linked to the service order activity, the serial number must exist. You cannot generate a serial when linking the item.

Cost line restrictions

- The processes related to maintenance or repair cannot be executed.
- The additional material lines added to a rental service order activity line, cannot be used to modify the rental equipment item of the activity. Consequently, you cannot modify the data related to physical breakdown changes.
- The repair related functionality such as Sub-contracting and Repair Warranty cannot be used for a material cost line.
- The **Contract Coverage** or **Warranty** is not applicable.
- Traveling is allowed, but Scrap is not allowed.

Note: Considering these restrictions, when executing the processes for a service order which can impact the related activities or cost lines, Infor LN considers only the activities and cost lines that are not related to rental agreement.

Assignments for rentable activities

You must link assignments to the rental agreement activities if the **Assignments are Mandatory** checkbox is selected in the **Service Order Parameters (tssoc0100m000)** session.

Actual location address for rental equipment

The **Actual Location Address** of a rental equipment can be maintained in the **Serialized Items (tscfg2100m000)** session. Infor LN defaults this value from the **Ship-from Address** or **Location Address** field in the **Service Order Activity** session. It is required to have the correct location (at least) available at the start and end of an activity.

In the **Service Order Activity** session, you can specify these addresses for the linked rental equipment:

- The starting address in the **Ship-from Address** field.
- The destination address in the **Location Address** field.

The location, ship from and actual location address can be changed during the rental period, in the **Service Order Activity** and the **Serialized Items (tscfg2100m000)** sessions.

Note: By default, Infor updates the **Actual Location Address** of the serialized item when the service order activity status is set to **Released** and **Completed**. However, during the release of a rentable service order activity, the **Actual Location Address** of the serialized item is updated with the **Location Address** only if the **Update Actual Rental Location** check box is selected in the **Release Service Orders (tssoc2200m000)** session.

During the completion of the service order activity, the **Actual Location Address** of the serialized item is updated based on the **Default Return Address** set for the serialized item:

- **Equipment Address:** By default, the equipment is returned to the own yard. The location address of the serial is considered.
- **Next Agreement Address:** By default, the equipment is moved from the first agreement location to the location of the next agreement. If the next agreement does not exist, the equipment is returned to the own yard. The location address of the serial is considered.
- **Other Address:** The **Change Equipment Actual Location Address (tscfg2265m000)** session is displayed wherein you can select the address.

The **Ship-from Address** of the service order activity is also updated based on the **Default Return Address** of the serialized item.

Note: When the equipment linked to a rentable service order activities has the **Default Return Address** set to **Other Address**, you must first complete the service order activity before the order is set to **Completed**. Consequently, completing an order or running the **Complete Service Order Activities (tssoc2206m000)** session is not allowed when activities, that are yet to be completed, exist.

Actual location address for material cost lines

The **Actual Location Address** of the serialized item of type rental equipment linked to the material cost lines are updated with the activity item address. If required, you can modify the address by setting the location address of the serialized item.

Ship to address

For a rentable service order activity and the related material order lines, the Ship-to address and the Location Address are same.

By default, the **Ship To Address** of the service order with the **Order Procedure, Rental** is set to **Location Address**.

GPS Data for the serialized item

If the **Track GPS Location** check box is selected in the **Serialized Items (tscfg2100m000)** session, Infor LN updates the GPS data in the **Serialized Item GPS Data (tscfg2106m000)** session, when the **Actual Location Address** of the serialized item is updated, and the coordinates differ from the last updated data. The GPS data can be retrieved from the related address.

This address used can be the actual location address for rental or be based on warehouse or service office address.

If a rental equipment is superseded using the **Supersede Serialized Item (tscfg2240m000)** session and the **Copy logistical and operational data** check box selected, the skills, GPS data, terms and information are also copied.

Transferring call to Rental Agreement

You can use the **Transfer to Rental Agreement** option in the **Call (tsclm1100m000)** session to access the **Create Rental Agreement (tscfg2207m000)** session.

If rentable equipment (Item and/or Serial Number) is linked to the call, Infor LN populates this data in the **Create Rental Agreement (tscfg2207m000)** session. Else, you must specify the valid data.

Chapter 5: Planning and reservation for equipment

For a rental equipment, you can maintain the availability in the **Rental Equipment Calendar (tscfg2562m000)** session. The rental calendar is created based on the **Calendar** and the **Availability Type** specified for the rental equipment in the **Serialized Items (tscfg2100m000)** session.

Creating rental equipment calendar

You can use the **Create Rental Equipment Calendar (tscfg2262m000)** session to create rental equipment calendar for the selected range of rental equipment.

Note: You can use the **Rental Equipment Calendar Synchronization Details (tscfg2164m000)** session to check if a rental calendar exists for an equipment.

Updating rental equipment calendar

You can use the **Update Rental Equipment Calendar (tscfg2262m100)** session to update the equipment calendars for the selected rentable equipment (serialized item).

Note: You can use the **Rental Equipment Calendar Synchronization Details (tscfg2164m000)** session to check if a rental calendar exists for an equipment.

Deleting rental equipment calendar

You can use the **Delete Rental Equipment Calendar (tscfg2262m200)** session to delete the equipment calendars for the selected rentable equipment (serialized item). The related Rental Synchronization Details are also deleted.

If the resource calendar is partially deleted, the Rental Calendar Synchronization data is updated with the system time.

Reservation for rental agreement

When creating a planned rental agreement, the rental availability is checked when creating the activity. Only if it 'fits' the activity is allowed to be saved.

The reservation for rental equipment is managed using the Planned Equipment Transaction (PET). When the service order activity for a rental equipment is saved, a PET is created in the **Planned Rental Equipment Transactions (tscfg2160m000)** session. The rental equipment calendar data is updated based on the PET.

The **Available** check box for the rental calendar is set based on the PET status:

- **soft:** The **Available** check box setting is not changed.
- **Hard:** The **Available** check box is cleared.

For a Hard PET record a check is performed if the Equipment is available during the whole period from PET-start date to PET-end date. All calendar records between these dates are set to unavailable. For a Soft PET record no such check is performed and the availability for related calendar records is not changed.

The PET status is based on the service order activity status:

- **Free:** The **PET** status is set to **Soft**. The rental agreement is displayed in the **Rental Equipment Calendar (tscfg2562m000)** session, but the **Available** check box is selected.
- **Planned:** The **PET** status is set to **Soft**. The rental agreement is displayed in the **Rental Equipment Calendar (tscfg2562m000)** session, and the **Available** check box is cleared.

Infor LN performs similar checks for the sub-equipment linked to material lines.

Maintenance can be performed for an equipment that you own using an internal Service Order (Rental Agreement check box is cleared) or Work Order. You can also create a Planned Activity for maintenance of the equipment that you own.

PET statuses for these orders are:

- Planned Activities: **Free** (Soft), **Released** (Hard)
- Work Orders: **Planned**, **Released** (Hard).
- Service Orders: **Free** (Soft), **Planned**, **Released** (Hard)

If you are planning maintenance for own equipment, the equipment must not be rented out during maintenance period. Consequently, these orders can also result in Hard PET records. However, there is one exception. For a service order, when the equipment is already rented out, the PET status is maintained as **soft** and no availability check is performed. You can plan maintenance on location.

Manual reservation

The Manual Reservations are used for renting out the equipment to internal employees. You must maintain to whom the item is rented out and when the item is returned.

When an equipment is rented to an internal employee, you must clear the **Available** check box in the **Rental Equipment Calendar (tscfg2562m000)** session, and create an exception for the item. Infor LN creates a record in the **Rental Equipment Calendar Manual Reservations (tscfg2163m000)** session.

When a manual reservation is created, modified or deleted, the rental equipment calendar is updated.

You can block a calendar period that can be excluded from the rental period. This blocked period can be used for an early reservation of a future rental agreement.

Loan equipment to Internal Employee

You can use the **In Use by Employee** field in the **Rental Equipment Calendar Manual Reservations (tscfg2163m000)** session to loan an equipment to an internal employee for a short period.

Chapter 6: Rental Equipment Request

The Rental Equipment Request functionality allows you to create a request for the internal rental of an equipment. These requests can be evaluated and processed to generate rental agreements.

Rental requests can be maintained in the **Equipment Rental Requests (tssoc5150m000)** session. A request contains data such as the sold-to business partner or project, required equipment and the rental period. A new rental request status is always set to **Free**, and you can modify the data.

A rental equipment request can be created:

- As part of the **Generate Planned PRP Orders (tppss6200m000)**
- For a Call
- Manually

Rental equipment request from Project

In Project, the Planned Equipment Request functionality allows you to rent equipment for a project. The request for the planned equipment can be created manually or generated from the Planned PRP orders created for an internal equipment.

By default, the status of this planned equipment request generated from planned PRP order is always set to **Planned**. For the planned equipment request that is created manually, by default, the status is set to **Firm-Planned**. You can view and process the planned equipment requests in the **Planned Equipment Requests (tppss6125m000)** session.

When a request is created manually, these two scenarios are possible:

- An equipment code is specified. In this scenario, the data such as the description, units, cost rate, planner and image are defaulted based on the selected equipment. You can modify data such as description, units and planner. However, you cannot modify the cost rate and the image.
- An equipment code is not specified. In this scenario, the equipment description and other data must be specified manually. You can approve and transfer this request to Service. In Service, an equipment is assigned to the request before the request is processed to a rental agreement

Note: A Planned Equipment Request is allowed for internal and external projects.

Processing a Planned Equipment Request

You can use the **Approve** option in the **Planned Equipment Requests (tppss6125m000)** session. The **Approve Planned Equipment Requests (tppss6222m000)** session is displayed wherein you can select the **Approve** option. The status of the planned equipment request is updated to **Approved**.

Note: This is a prerequisite for the equipment request to be transferred to Service.

To transfer the request to Service, you can use the **Transfer** option in the **Transfer Planned Equipment Requests (tppss6232m000)** session which can be accessed from the **Planned Equipment Requests (tppss6125m000)** session.

When the request is transferred to Service, Infor LN creates a request in the **Equipment Rental Requests (tsoc5150m000)** session with the **Origin** field set to **Planned Equipment Request**.

The Planned Equipment Request can be deleted manually as long as the Rental Equipment Request has the status **Free**. When the Planned Equipment Request is deleted, the linked Rental Equipment Request is also deleted.

The Planned Equipment Request cannot be deleted manually if the Rental Equipment Request is transferred to a Rental Agreement.

The Planned Equipment Request cannot be canceled, once the request is transferred to Service. However, if the Rental Equipment Request is canceled, the status of the Planned Equipment Request is updated to **Canceled**. You cannot transfer this request to Service once again.

Note:

The canceled Planned Equipment Request can be:

- Transferred to a Planned PRP Purchase Order
- Copied to a new Planned Equipment Request
- Deleted

Order Line Balance

In the **Order Line Balance (Equipment) (tppss6501m000)** session:

- As long as the Planned Equipment Request is not transferred to Service, the request is displayed as Planned Equipment Request.
- After the Planned Equipment Request is transferred to Service, the request is displayed as Rental Equipment Request.
- When the status of the Rental Agreement created from the request is set to **Planned**, the request is replaced with the Rental Agreement.

When the Rental Agreement status is set to **Released**, the rental agreement is no longer displayed in the **Order Line Balance (Equipment) (tppss6501m000)** session, and a record is created in the Delivered Order Lines.

When multiple Rental Agreements are created for Rental Equipment Request quantity greater than 1, the Rental Equipment Request is displayed in the **Order Line Balance (Equipment) (tppss6501m000)** session until the last Rental Agreement status is set to **Planned** or **Canceled**.

Costs for Planned Equipment Requests

Costs booked on the Rental Agreement are displayed as project pegged costs in the **Financial Transactions (tpppc2100m100)** session as follows:

- **Transaction Origin:** Service Order
- **Financial Transaction:** General Costs

When the Rental Agreement is completed, the project pegged costs are displayed in the **Financial Transactions (tpppc2100m100)** session as follows:

- **Transaction Origin:** Service Order
- **Financial Transaction:** Transfer from Service WIP

Rental equipment request from Call

A rental equipment request can be created for a call from the **Call (tsclm1100m000)** session.

You can use the **Transfer Call to Rental Request** option. The **Create Equipment Rental Request (tsoc5250m000)** session is displayed wherein you can specify the details and select the **Create** option. Infor LN creates a request in the **Equipment Rental Requests (tsoc5150m000)** session with the **Origin** field set to **Call**.

The status of the call is updated to **Transferred**.

Processing rental equipment requests

You can process a rental equipment request with the status, **Free** to generate a rental agreement.

You can use the **Create Rental Agreement** option in the **Equipment Rental Requests (tsoc5150m000)** session, to create the agreement based on the specified data. When you select this option, the **Create Rental Agreement (tsoc5220m000)** session is displayed, wherein you can select the **Series** based on which the rental agreement(s) must be created.

If the rental agreement(s) is successfully created:

- The rental request is updated with the related service order and the activity number.
Note: If multiple agreements are created, only the first service order number is updated on the rental request.
- The **Origin** of the rental agreement is updated to **Project Request for Rental, Call Or Manual**.
- The **Rental Request Text** is updated in the **Rental Agreement Activity Text** field.

Deleting a rental equipment request

The process of deleting a rental equipment request in Service is based on the Status and the **Origin** of the request.

If the **Status** of the rental equipment request is set to:

- **Free**,
 - You cannot delete a rental equipment request with the **Origin, Planned Equipment Request**. The process of deleting the request must be initiated from Project.
 - You can delete a rental equipment request with the **Origin, call**. When the request is deleted, Infor LN updates the status of the related Call from **Transferred** to **In Process**. The related links are also deleted.
 - You can delete a rental equipment request with the **Origin, Manual**.
- **Cancelled**, for all values of **Origin**, you can delete the rental equipment requests.
- **Processed**, for all values of **Origin**, Infor LN deletes the rental equipment request when the related rental agreement is deleted. The related links are also deleted.

Cancelling a rental equipment request

You can cancel the rental equipment requests for all values of **Origin** using the **Cancel** option in the **Equipment Rental Requests (tssoc5150m000)** session.

The **Cancel Equipment Rental Request (tssoc5252m000)** session is displayed where you must specify the **Cancel Reason** and the **Cancel Date**. When the request is cancelled successfully:

- This data is updated in the **Equipment Rental Requests (tssoc5150m000)** session:
 - The **Status** of the rental equipment request is set to **Cancelled**.
 - The **Cancel Reason** and the **Cancel Date** are updated as specified in the **Cancel Equipment Rental Request (tssoc5252m000)** session.
- For the request with the **Origin, Project**, the data is updated in Project.
- For the request with the **Origin, call**:
 - The related links are updated or deleted.
 - The Call status is updated from **Transferred** to **In Process**.

Chapter 7: Equipment Management Workbench

You can use the **Equipment Management Workbench (tscfg8351m000)** to assign a specific Equipment to a Rental Agreement Line and to assign one or more employees to this Rental Agreement.

The assigned employee is responsible to handle the Equipment.

To access this workbench, you can:

- Select **LN Menu > Service > Rental > Equipment Management Workbench**.
- Use the **Workbench** option in the **Equipment Rental Workbench (tscfg2600m100)**. The Serialized Item Group, From and To dates (time horizon) are defaulted in the **Equipment Management Workbench (tscfg8351m000)** from the parent session based on the equipment selected in the **Equipment Rental Workbench (tscfg2600m100)**.

Note: The workbench considers the **Department** specified in the **Service User Profiles (tsmdm1150m000)** session and the values set on the **Preferences** tab of the **User Profile Details (uigwt0102s000)** session.

Prerequisites to access the workbench:

- The user profile must be defined in the **Service User Profiles (tsmdm1150m000)** session
- The service offices must be defined.
- The **Distance Unit for Meters** must be specified in the **COM Parameters (tccom0000s000)** session.
- The units for **Day, Week, and Month** must be specified in the **General Service Parameters (tsmdm0100m000)** session.
- The **Order Procedure** of the rental agreement must be **Rental**.

The Equipment Management Workbench consists of:

- Toolbar
- Resources Gantt
- Grid (Activities and Material)
- Location (Map)

Equipment Management Workbench toolbar

You can use these options from the toolbar of the **Equipment Management Workbench (tscfg8351m000)**:

- **Refresh:** Refreshes the workbench data.
- **Gets the latest order changes:** Retrieves the latest order changes from Infor LN.
- **Department:** Allows you to select the departments that must be considered for the workbench.

- **Serialized Item Group:** Allows you to select the serialized item groups that must be considered for the workbench.
- **From and To Dates:** Allows you to define the time horizon.
- **Workspace:** Allows you to set the view of the workbench. Possible values:
 - Default View
 - Full Gantt on Top
 - Full Gantt on Top with Map Minimized
 - Full Map on Right
- **Auto Refresh:** Allows you to set the time period after which the workbench data must be auto refreshed. This is an indicator which is displayed when Auto Refresh is executed.

The user settings can be viewed by selecting the **User Settings** option from the workbench **Settings** menu. You must select the **Save Defaults** option to save the updated settings for the workbench. You can use the **Clear Defaults** option to revert all the changes that are not saved. The **Get Defaults** option allows you to retrieve the last saved settings.

Equipment Management Workbench Resources Gantt

The Resources Gantt of the **Equipment Management Workbench (tscfg8351m000)** displays the graphical view of the available and non-available times for the selected Equipment or the Employee.

Equipment Gantt displays the Rental Agreement Lines, Materials and Planned Activities, assignments for the Equipment (Serialized Items) retrieved for the selected serialized item groups. Employee Gantt displays the employee assignments to the Rental Agreements for all the employees belonging to the selected departments.

Gantt toolbar

These toolbar options are available for Gantt:

- **Gantt:** Allows you to change the Gantt mode. There are three Gantt modes in the workbench:
 - **Automatic:** Based on the selection from Activities/Materials grid, the Gantt switches to either Equipment or Employee Gantt. When an unassigned equipment rental agreement is selected, the Gantt switches to Equipment mode. When an unassigned employee rental agreement is selected, the Gantt switches to the Employee mode.
Note: In this mode, first preference is given to the Equipment assignment.
 - **Equipment:** The Gantt is fixed to the Equipment mode.
 - **Employee:** The Gantt is fixed to Employee mode.
Note: The default mode is Automatic which displays the Equipment Gantt.
- **Ignore Calendar:** Select this check box to ignore the calendar functionality for an employee assignment.
- **Ignore Skills & Available Resources:** Select this check box to ignore the skills and available resources. When this check box is selected, based on the Gantt mode, all equipments/employees are displayed for the selected unassigned activity.
- **Skills:** Allows you to select the skills that must be considered for an employee.
- **Show Available Resources:** Select this check box to display the available resources. When this check box is selected, based on the Gantt mode, available equipments/employees are displayed for the selected unassigned activity.

- **Freeze Gantt Scale:** Select this check box to freeze the Gantt scale when an unassigned activity is selected. In general, the Gantt scale is moved to the planned start time of the selected activity. When this check box is selected, the Gantt scale movement is frozen.
- **Update Calendars:** Allows you to actualize all the calendars that are changed from the workbench using the Create or Change Working Hour option.
- **Time Scale View:** You can select the view for the time scale of the Gantt. Possible values:
 - Day View
 - Week View
 - Month View
 - Quarter View
 - Year View
- **Time Scale:** You can define the time scale for the Gantt. Possible values:
 - Today
 - Next Day
 - Previous Day
 - Next Week
 - Previous Week
- **Previous/Next Page:** Allows you to move the Gantt scale to previous/next page.
- **Previous/Next Period:** Allows you to move the Gantt scale to previous/next period.
- **Go to Date:** You can select a date from the calendar to move the Gantt timescale start to that date.

Context menu options

You can right click in the Gantt to view the context menu options.

If the Gantt mode is set to **Employee**, these menu options are available to manage calendar working hours:

Create or Change Working Hour

Allows you to create or modify the working hours.

Create or Change Working Hour (With Defaults)

Allows you to create a Working Hour with the defaults defined in the Create or Change Working Hour user settings.

Create or Change Working Hour (Prefill)

The data in the Create or Change Working Hour is displayed and the data is defaulted based on the values defined for the related working hour on which this menu option is selected.

Convert Non-Available to Available Working Hour

Converts the non-available working hour to available working hour. The related working time is set to Available and the Working Hour Type and Description fields are cleared.

Note:

- These menu options are grouped under the **Working Hour**.
- You must select the **Update Calendars** option on the toolbar after modifying the date, to actualize all the changes.

Equipment Management Workbench Location map

The Location section of the **Equipment Management Workbench (tscfg8351m000)** provides a map view to identify the location of the employees, equipments, rental agreement lines (assigned/unassigned based on the Gantt mode), planned activities and vendors.

Location toolbar

These toolbar options are available for Location section:

- **Pushpin Size:** Allows you to set the size of the pushpins on the map.
- **To Show List:** You can filter the data to be displayed based on Employees, Rental Equipments, Rental Agreements and Planned Activities. Similarly, you can filter the Assigned and Unassigned rental agreements that must be displayed on the map.
- **Enable Zoom:** Allows you to enable or disable the zoom feature. When this option is cleared, the map remains at the zoom level already selected by you and you cannot zoom in further.
- **Find Closest Equipment:** Allows you to find the equipment closest to the selected unassigned rental agreement.
- **Find Closest Employee:** Allows you to find the employee closest to the selected unassigned rental agreement.
- **Find Closest Vendor:** Allows you to find the vendor closest to the selected unassigned rental agreement.

Equipment Management Workbench Activities and Material grid

The grid section of the **Equipment Management Workbench (tscfg8351m000)** consists of Activities and Materials grids.

The **Activities** grid displays the Rental Agreement Lines (assigned/unassigned equipment/employee) and Planned Activities for the equipments retrieved for the selected serialized item group(s).

The **Materials** grid displays the material lines (assigned/unassigned equipment) with the **Delivery Type** field set to **From Rental Fleet** for the rental agreement lines retrieved for the selected serialized item group(s).

Activities grid toolbar

These toolbar options are available in the Activities grid:

- **Equipment:** Select whether the equipment assigned, unassigned or both must be displayed.
- **Employee:** Select whether the employee assigned, unassigned or both must be displayed.
- **Planned Activities:** Select this check box to view the planned activities.
- **Skills:** Allows you to view the skills defined for the selected activity.
- **Sort by Selected Activities:** Allows you to move the selected activity to the top.
- **Filters:** These are the options to manage the filters:
 - **Add:** A new filter with the specified name is added.
 - **Update:** The current filter is updated with the latest changes.

- **Remove:** The current filter is deleted.
- **Clear Filters:** Clears all the applied filters.
- **Unassign:** Unassigns the selected assigned equipment or employee.
- **Date Filter:** Allows you to filter the activities based on the selected option. Possible values:
 - **None:** Date filter is cleared.
 - **Today:** Shows today's activities.
 - **Tomorrow:** Shows tomorrow's activities.
 - **Current Week:** Shows current week activities.
 - **Next Week:** Shows next week activities.
 - **Custom:** Shows activities between the selected from and to dates.

Equipment Management Workbench user settings

The User Settings of the **Equipment Management Workbench (tscfg8351m000)** allows you to set the values related to the workbench.

The settings are grouped into these three tabs:

General

These settings are available on the General tab to define the data displayed in the workbench:

Views

In this section, you can select the views that must be displayed in the workbench such as Origin and Status. To differentiate between different origins on the Gantt, the pattern can also be specified.

Planning Horizon

In this section, you can set the **Type** field to **Fixed** or **Relative**. **Fixed** type retrieves the data from the date as specified in the **From** field. **Relative** type retrieves the data based on the current date. The **Days** field can be set to the number of days for which data must be fetched from Infor LN.

When the **Type** field is set to **Relative** and the specified +/-Days range is set to a value beyond 90 days, a disclaimer message is displayed to indicate that performance issues can occur in the application. The specified value is accepted only when you accept the disclaimer message.

Note: You can specify the -Days up to 180 days and +Days up to 450 days.

Activities (Grid)

In this section, you can select to display the assigned or unassigned equipment, employees, or planned activities in the Activities section of the workbench.

Location

In this section, you can set these values:

- **Map Zoom Level:** The default zoom level of the map for the workbench.
- **Pushpin Size:** The default size of the pushpin to be displayed on the map.
- **Enable Zoom:** Select this check box to enable the zoom in and zoom out on the map.

- **GPS Latitude (WGS84), GPS Longitude (WGS84):** Specify the location to zoom in the map when the workbench is launched.
- **Show Location:** Select this check box to show the Location section.
- **Proximity Circle Radius:** Specify the radius of the proximity circle drawn surrounding the selected unassigned equipment rental agreement.
- Show Vendors:
 - **Inside Proximity Circle:** Select this check box to show vendors inside the proximity circle.
 - **Outside Proximity Circle:** Select this check box to show vendors outside the proximity circle.

Distance Calculation Inputs

In this section, you can specify these values to calculate the distance between two locations:

- **Average Travel Speed:** The average travel speed to reach the location of the serialized item.
- **Travel Offset Time:** The offset time for a visit to the location of the serialized item.

Map Pushpins

In this section, you can set the colors for the pushpins based on the status.

Others

In this section, you can specify these values:

- **Auto Refresh:** Select this check box to enable auto refresh of the data displayed in the workbench. You can also set the duration after which the data must be refreshed.
- **Exclude Departments:** Select the departments that must be excluded from the workbench.
- **Exclude Employees:** Select the employees that must be excluded from the workbench.
- **Copy User Settings from:** Select the name of the user whose user settings must be copied to the current workbench user.
- **Grid Page Size:** The default page size for the Activities grid.
- **Display Density:** Workbench adopts to the selected display density.

Qualification Type

In this section, you can set the colors for the different qualification types such as Skill, Competency and Credential.

Gantt

These settings are available on the **Gantt** tab to define the display options for the Gantt:

View Options

In this section, you can define these values related to the time for the Gantt:

- **Time Scale:** You can define the time scale for the Gantt. Possible values:
 - **Today**
 - **Current Week**
 - **Current Month**
 - **Current Quarter**
- **Today:** The number of working hours that must be displayed for a day and the starting time for the day.
- **Week:** The number of working days that must be displayed for a week and the starting day of the week.
- **Hide Friday & Saturday:** Select this check box to hide the Friday and Saturday from the Gantt.
- **Hide Saturday:** Select this check box to hide the Saturday from the Gantt.

- **Hide Sunday:** Select this check box to hide the Sunday from the Gantt.
- **Set Day Hours:** Select this check box to specify the working hours in a day.

Availability

In this section, you can set the colors for the availability and non-availability of an Equipment/Employee.

Legends

This option is used to configure the Legends that must be displayed on the Gantt.

Create or Change Work Hour

In this section, you can define the defaults for creating and changing work hours.

- **Enable Create or Change Working Hour Defaults:** Select this check box to default the values defined in this section in the 'Create or Change Working Hour' dialog.
- **Availability:** Select this check box to create/modify available working hour.
- **Time From:** Select the default time from for the working hour.
- **Time To:** Select the default time to for the working hour.
- **Working Hours Type:** Select the default working hour type.
- **Description:** Select the default description for working hour.
- **Duration:** Select the maximum days allowed between the Start Time and End Time.

Others

In this section, you can define these settings:

- **Show Available Resources:** Select this check box to display the available resources in the Gantt.
- **Ignore Skills & Available Resources:** Select this check box to ignore the skills and the available resources.
- **Freeze Gantt Scale:** Select this check box to freeze the Gantt scale.
- **Round Drop Time to:** Select a value to define the granularity of related drop in time. When we drag and drop an activity bar on Gantt, the time rounding is done based on this value.
- **Show Activity Constraints:** Select this check box to view the first two rows of the Gantt.
- **Show Employees With Effective Skills:** Select this check box to consider effective date of the skill when filtering the employees based on skills.
- **Show Picture:** Select this check box to display the picture of the employee/equipment on the Gantt resource.
- **Show Conflict Indicator on Activity Bar:** Select this check box to view the conflict indicator on the Planned Timeline. When this check box is selected, the conflict icon is also displayed on the Activity bar.
- **Show Calendar Working Hour Description:** Select this check box to view the calendar working hour description on the Gantt row.
- **Compact Overlapped Activities:** Select this check box to reduce the gap between the overlapped activities.
- **Show Travel Indicator:** Select this check box to show a travel indicator based on the planned or actual travel times on the Gantt activity bar (employee assignment).
- You can also set colors for **Planned Indicator**, **Earliest Latest** and **Highlight Border**.

Working Hours Type

In this section, you can select the Working Hours Type and set the colors for the available and non-available calendar working hours. The employees having the calendar working hours with the selected Working Hours Type are displayed in the visible timeline of the Gantt.

Custom Working Hours

In this section, you can define the custom calendar working hours. To add a new custom calendar working hour, right click in the grid and select **New**. The **Custom Working Hour** window is displayed wherein you can specify the data. After adding a custom working hour, when you right click on the row, you can view the options to **Edit** and **Delete** the row.

Note: The **Custom Working Hour** option is displayed in the Gantt only if the **Custom Working Hour Menu** check box is selected.

Service

These settings are available on the Service tab to define the display options for the Planned Activities section of the workbench:

General

In this section, you can define these settings:

- **Show Service User Profile Departments:** Select this check box to show the only departments defined in the service user profile in the workbench.
- **Activity Block Description:** The selected values are displayed in the activity bar.
- **Color Procedure:** You can define the colors for the activity bar based on the Color Procedure. For example, if the Status is selected, the colors defined for the activity status such as Free, Released, and Planned are displayed.
- **Exclude Service Order Series:** The order series to be excluded from the workbench.

Status

In this section, you can set the colors for the different status of the activities.

Assignment Times

In this section, you can set the colors for the different assignment times of the activities.

Indicator Symbols

In this section, you can set the symbols and colors for activities.

Service Order Activity Tooltip

In this section, you can select the service order activity fields that must be included in the tooltips that are displayed on the Map and the Gantt.

Planned Activity Tooltip

In this section, you can select the planned activity fields that must be included in the tooltips that are displayed on the Map and the Gantt.

Service Type

In this section, you can set the colors for the different service types.